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ABSTRACT

This paper reports on a proposed project to be undertaken to improve the morale, image, and service of the Bursar's Office at Nova Southeastern University. The project calls for: (1) a brainstorming meeting of the bursar's office staff; (2) bursar's office staff to offer suggestions to improve services; (3) the encouragement of teamwork and collaboration among the staff; (4) improvement of staff development and new employee orientation activities; (5) modeling of behaviors conducive to improved service and morale by the university bursar and controller; (6) increased individualized contact between staff and students; and (7) staff recognition and encouragement. Two appendixes provide an organizational chart of the bursar's office and a timeline for the implementation of the project. (MDM)

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DEVELOPMENT OF A PLAN TO IMPROVE THE MORALE, IMAGE AND SERVICE OF THE BURSAR'S OFFICE AT NOVA SOUTHEASTERN UNIVERSITY

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A practicum product presented to Programs for Higher Education in partial fulfillment of the requirements for the degree of Doctor of Education

Nova Southeastern University

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Chapter 1

INTRODUCTION

The bursar's office at Nova Southeastern University has twenty-four employees, with three managers reporting to the bursar, as shown in Appendix A. The employees have extensive interaction with students. The staff deals with students and their parents (or spouses, guardians, and other family members) in person, by mail and over the phone regarding financial matters.

Employees review and process registration forms; accept and record payments by cash, check and credit card; disburse government loans; issue refund checks; establish deferred payment arrangements and perform a variety of other student-related fiscal functions. In performing these duties, the staff interacts extensively with personnel from all academic centers, as well as the financial aid, student life, and other administrative offices.

Unfortunately, the bursar's office staff at NSU is perceived by students and other employees as unfriendly and impolite in dealing with students' financial problems, questions and concerns. Employees of the bursar's office do not like their negative image and are not proud of working there.

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It is a key area needing change to meet the president's challenge of world-class service to students. The office's service and image should be one of caring and sensitivity and of delivering superb assistance to all components of the university community.

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Chapter 2

GOALS AND OUTCOMES

This plan of action, which contains over two dozen specific suggestions, was developed with three goals in mind: upgrading service to students and fellow employees, improving image and raising morale of the bursar's office at NSU. These three goals are linked to a major, desired outcome: delivering world-class student service by recognizing the student as the customer.

Upgrading Service

Staff members in the bursar's office need to improve the tone of their contacts with students and their attitude toward the students to reflect better customer service. A few years ago, the office was highly criticized by NSU's outside auditors for the university's accumulation of $14 million in outstanding student accounts receivable. Staff members felt they were being blamed for various program payment policies which were beyond their control. Their frustrations were mirrored in their contacts with students and various program staff.

Although the financial situation has changed dramatically and students are presently paying their bills on a timely and current basis, the staff's atti-

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tude toward students remains somewhat negative and adversarial. However, the staff's attitude needs to be friendly and helpful. For example, employees should strive to greet students pleasantly in person or over the telephone, to use their names during conversations, and to avoid using technical accounting or processing terminology which the students may not understand.

Improving Image

Staff members need to work on improving the general image of the bursar's office. Service to students from the office has improved dramatically over the last few years for many reasons--better financial software, additional personnel, more phone lines and updated equipment. However, the office has never received appropriate recognition for these improvements and its image at the institution is very poor. The university community regards the office as uncaring and aloof.

Raising Morale

Employees in the bursar's office need to develop pride in themselves and in their work. The staff is not proud of being in the bursar's office. Staff members enrolled in night classes, for instance, will not tell fellow students that they work in the bursar's office. Raising morale is the third goal of this plan.

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Summary

The following plan, based on current transformational leadership theories, is designed to assist the staff to improve the way in which bursary services are communicated and presented to students and other employees throughout the university. In summary, the individuals in this office have failed in the political frame; greater sensitivity to the mood of the campus is needed.

The staff must improve their public relations to gain the credit and recognition which they deserve and to improve the image of the bursar's office. Employees in the office also need to develop a sense of pride in their work. They should feel like part of an overall team effort which delivers world-class service to its customers, the students. This sense of pride and team work will raise their morale.

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Chapter 3

PLANNED ACTIVITIES

A variety of activities are planned to challenge the current process, to develop and inspire a shared vision, to enable others to act, to serve as a model and to encourage the individuals who will be involved. These concepts are all elements of modern transformational leadership models.

The activities presented and discussed in each of the following sections are subject to revision, refinement and even rejection by the staff of the bursar's office. Input of the bursar's office staff is desirable because change is most successful when those affected become involved in any plans affecting them.

Challenging the Process

Opportunities must be explored to improve office processes, internal attitudes and external image to achieve better service for students in fact and in public opinion. After identifying opportunities, alternative procedures and approaches to problematic situations must be proposed, developed and attempted for improvement to occur.

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Search for Opportunities

To begin the search for opportunities, this plan provides for an informative, brain-storming meeting of the bursar's office staff. In this meeting, the bursar will discuss the challenge of better service and explain the reasons NSU is striving for it at all levels: Increasing competition from other institutions in recruiting students, as well as the University's need to expand its population base and to improve its retention rates.

It would be encouraging if the president could speak to the bursar's staff directly and personally request their help and special attention to his vision and goal. Alternatively, the president can send a special letter or personal memo on his stationery to the bursar's staff. This memo would express his need for their support and stress the importance of their role and potential contributions to the university's success.

In addition, it would be helpful if the newly appointed Vice President for Finance could spare the time to be introduced on an individual basis to all staff members in the bursar's office. Possibly he could

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also speak briefly to the group about their key role at to the university, in lieu of the president.

At this meeting the bursar will discuss the three general areas needing improvement: morale, image and service. The proposed activities in this plan can also be considered by the staff. During the meeting the group can begin to generate a list of their potential ideas to be reviewed, revised and implemented by them.

Experiment and Take Risks

The plan encourages the staff to question their role in serving students, to offer ideas about how they might proceed to make changes, and to express their collective opinions about the activities included in this plan and their own ideas. The plan also proposes that the staff consider inviting several students to participate in future periodic meetings and to obtain suggestions from them.

As many employees in the bursar's office are currently enrolled in degree programs and taking courses themselves, they will be encouraged to share personal observations with their co-workers. These employee-students can also serve as a resource for obtaining other students' suggestions. This gathering of new ideas is not perceived as a one-time event, but rather a

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continuing, on-going component on everyone's agenda of improvement.

Inspiring the Vision

One of the goals of this plan is to establish a team spirit with collective enthusiasm which will generate many ideas and methods to improve service and image. The controller and the bursar must communicate their vision for the future and enlist others to implement the needed changes successfully.

Envision the Future

The controller and the bursar can envision a future where everyone on campus--students, professors, administrators, other employees--speak well of the bursar's staff and the great people working there. They would like to see the staff win kudos like the vaunted sales associates at Nordstrom's department stores, for example.

Staff can imagine a stream of complementary letters, memos, and notes being spent to the president, to the vice presidents, to academic deans and others, and to the individuals themselves. Employees can see an occasional bouquet of flowers or small gift arriving at

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the bursar's office in recognition and appreciation for extraordinary assistance to a student.

Disruptive, angry confrontations with students in person and over the phone will be eliminated. Letters of complaint and criticism will stop. The need to investigate unfavorable incidents--reported to the president, deans and others--will end.

The controller and the bursar can project fewer rejected registrations and returned loan disbursements because the staff proactively assists students who would otherwise have paperwork delays and other problems. Staff members will investigate and solve problems for students instead of referring them to another office or another person.

They anticipate a day when all the employees of the bursar's office are proud to work there and feel that they are making an important contribution to the institution. They imagine a time when employees will willingly tell others that they are part of the bursar's office.

Enlist Others

The staff might select a few of its members to serve as a quality circle in gathering and evaluating suggestions, rather than the supervisors doing so. This

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choice would permit the sharing of power which does not usually occur on the non-professional level at the university. Such involvement is vital, however, in improving service to students because classified staff members handle the vast majority of decisions in processing performed by the bursar's office. They consistently deal one-on-one with students and representatives of the various campus units.

This plan contains a list of ways in which the bursar's office might improve service and others' perceptions of their service. These preliminary proposals are meant to stimulate and evoke additional ideas from them. As a preliminary step, the staff members might consider taking a survey among themselves to identify problems and to suggest solutions.

Only by gaining the attention, agreement, commitment and active participation of the staff can the plan enlist them in attaining better service. Only through the employees' individual and collective efforts can real change be achieved in the quality of service which they render and in others' perception of that service.

Enabling Others to Act

The members of the bursar's office must act in new ways, collaborating one another within the department as

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well as with others throughout the university to achieve the common goals of improving service to students, enhancing their reputations and building their pride. Although the bursar's staff is qualified and experienced, these individuals can be strengthened with new ideas and training for improving service, their image and their internal attitude.

Foster Collaboration

The plan is designed to encourage individuals in the bursar's office to help one another and to interact more positively with students as well as the staff of the financial aid office and other academic and administrative areas. It is important that they assist one another and share workloads during peak periods, for example, to render better service.

At one time the staff in the bursar's office had periodic meetings to discuss registration schedules, changes in practices or policies for loans, refunds, payment plans and other items which affected them. These meetings generated an esprit de corps and should be resumed as good communications and team spirit is necessary for success.

Representatives from the financial aid, registrar and program offices could also be invited to attend the

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bursar's office staff meetings as a means of increasing collaboration and cooperation. This increased communication and rapport could have very positive impact on the bursar's office as the three departments--bursar, financial aid and registrar--share some of the same software and must interact closely, especially in difficult situations.

It would be very beneficial to foster collaboration by utilizing the bursar's employees' existing campus networks. Each of the twenty-five staff members could ask those in their campus networks for suggestions on what improvements could be made and how the bursar's office could give students better service.

At the same time, the bursar's office staff should share difficult situations and successes with those they know. This use of their private infrastructures at the university would assist the bursar's office to enhance its image on campus and to get faster, better responses in solving problems and helping students.

The word could be expected to spread about the bursar's new focus and goals. This networking would be self-reinforcing in producing better service and a perception of greater helpfulness by the staff to others on campus.

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Strengthen Others

One training film was shown in the bursar's office several years ago. Otherwise, professional development for this area has been neglected. More training activities would strengthen the staff quickly and easily. There are films available on telephone courtesy, dealing with customers, handling anger, and other issues which would assist the employees to serve students more effectively.

New employees, especially those working the front counter and answering telephone calls, need to learn not only a great deal of specific information quickly, but also personal techniques in dealing with angry, confused and abusive students. Perhaps an introductory video could be prepared for training purposes, starring some of NSU's most experienced staffers.

The training of staff might be expanded to include working for a day or two in another area within the bursar's office, in the neighboring registrar's office or financial aid office, or in academic programs' offices. This exposure would give individuals in the bursar's office a opportunity to see others' activities and problems and to enhance teamwork.

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It might be helpful for employees in the office to try role-playing to devise and practice scenarios for dealing with problematic, reoccurring situations. One troublesome question which has already occurred is why students in the health professions division cannot pay by credit card as can students in the other divisions. Preplanned, rehearsed answers to this question and similar ones will simplify interpersonal dealings for the staff.

In addition, employees can be invited and encouraged to attend campus presentations organized by the human relations department for campus personnel. The subjects of these past periodic seminars have included time management, effective supervision, improving interpersonal relations and better customer relations. Presentations for the bursar's office might include film-strips, videos and other techniques to strengthen the staff's skills.

Modeling the Way

The controller and the bursar need to set an example for improving service by taking turns waiting on students at the window or answering the phones. In this way, they may be able to identify better ways to handle

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certain types of problems or activities which can be implemented quickly and easily for immediate small wins.

Set the Example

Many new ideas and activities are needed to set the example of better service and image for the office. One new approach is to have the bursar write a column for the student newspaper about student loans and other topics. This column would help students be better informed and simultaneously promote a proactive, helpful image for the bursar's office. Other staff members could suggest ideas for following columns and perhaps write them as well.

The financial aid office has prepared a fact sheet for students' information; the bursar's office might compile a similar one. It could explain the various functions and services which the office provides.

It may be possible to eliminate some processing steps for registrations, to increase automation or to utilize more student workers or temporary help for filing and clerical tasks. These improvements would reduce the pressure on the staff and allow them more time to speak with students. With less pressure, they can be more at ease and feel freer to give each student more time and attention.

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As many adult students bring their young children to the bursar's window when registering or paying their bills, the office might provide a small basket of lollipops for these little ones as banks and other businesses sometimes do. This gesture would establish an immediate rapport with the students, as well as enable them to concentrate on their business rather than dealing with fussy children.

Posting a few cartoons or humorous quotes about campus life on the glass of the bursar's window would be a friendly gesture to all who pass in the hall. These cartoons could also provide a laugh or a smile while students were waiting to be helped.

The bursar's office needs a more participatory image on the campus with both students and other employees. The financial aid department, registrar's office and student life departments, for example, usually have staff participating in student activities such as the annual gong show, student talent show and boat race. The bursar's office has not been involved in these events for more than five years. Some individuals could represent the office in these events in the future as part of the office's efforts to create a more outgoing image.

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Perhaps the bursar's office staff can adopt slogans which emphasize the importance of their attitude and set an example for one another. These slogans could be typed on labels and stuck on phone receivers, for instance. Each time that someone picked up the phone receiver, they would see the slogan and be reminded of the department's goals. The slogans might be something like "Coddle your paycheck" or "What if it were your child?"

Plan Small Wins

Changes suggested by employees should be acknowledged and the individual recognized. Perhaps all suggestions could be posted to permit everyone to comment on them and to serve as a stimulus for additional ideas.

The staff might find business cards helpful. Although only professional-level staff members in the bursar's office have received business cards in the past, this is not formal university policy. Staffers working the bursar's counter might find it helpful to give students their cards for future reference. Students would be encouraged to feel that they had a personal contact if they received a card and were told to call directly if they had further questions.

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Better service is more personal service. Employees should greet students pleasantly on the telephone and at the counter and address them by name frequently during their conversation.

According to transformational leadership theory, employees will give others more personal service if they themselves are treated as individuals and if they feel more important. The person working the bursar's window might place their name plaque on the counter so that they are identified to students.

Rather than sending students form letters with the mechanical signature of the bursar, another way of personalizing operations would be to have the letters signed by the individual mailing them (and notifying students of various problems). The individual could also note their extension and specific comments on the letter, as necessary.

To encourage small wins, a bulletin board of celebration, modeled after Paul D. Camp Community College's wall of celebration, could be established. Thank you notes from students and others would be displayed on this board, along with letters of praise or commendation, certificates for completion of professional programs, and other items recognizing achievements.

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Encouraging the Heart

In times of change, it is important to achieve momentum with a positive atmosphere. This can be done by recognizing individual contributions and engendering an atmosphere which celebrates accomplishment by all.

Recognizing Individual Contributions

To recognize individual contributions, the office might begin an employee of the month award for student service. This could consist of having the employee's picture mounted prominently in the office or at the hall window for all to see. Perhaps there could be a brief writeup as why the person is being honored.

A material gesture is also possible. Perhaps the office could get a trophy for the individual to keep on his or her desk during the award month. An alternative suggestion is to give the individual a token gift, such as a $25 desk clock from the university's bookstore, or a gift certificate.

Many offices on campus have personalized note paper for their employees which shows their name and title. The staff in the bursar's office is entitled to similar perquisites. Having personalized stationery will enhance their stature and empower them to take more risks in helping students. In addition, having their

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own writing paper serves to recognize their individual contributions and specific work.

The group may prefer other ideas or modify these. Their participation will develop the feeling of involvement and empowerment that is required to achieve meaningful change.

Celebrate Accomplishments

Each month the bursar issues a report on receivables to University officials, including the cabinet and academic deans. This report includes a narrative section which can be used to announce the monthly winners and explain the reason for their selection with a brief mention of the difficult situation they solved or the extraordinary services they performed.

This type of announcement would provide very high level recognition and a celebration of individual achievements. At the same time, publication of these situations will enhance the service image of the office and make others on campus aware of the excellent service which is being rendered.

The vice president of finance and the controller of the university, to whom the employees of the bursar's office ultimately report, can also contribute to the celebratory impact. They can call or write the monthly

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winners to enhance their sense of achievement and recognition.

An electronic message screen can be installed to appear on pc terminals whenever the students' financial accounts are accessed. This screen, which would be seen widely, can be utilized by the bursar's office to communicate campus-wide announcements, to publicize unusual situations, and to acknowledge special services being rendered. This new means of communications will assist in dispelling the office's seeming aloofness to the campus and its uncommunicative image.

Financial operations is functionally divided into two primary parts--the bursar's office and the controller's office--and housed in different buildings. This results in limited interaction for employees even within their own department. Once a year, financial operations has a new year's party well attended by controller's office personnel, however, not many individuals from the bursary staff attend. The bursar's staff needs to be encouraged to join the festivities and feel part of the group.

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Chapter 4

TIME LINES

Improving student service is an on-going project which is ultimately never ending. However, very obvious and measurable results can be achieved in three to six months with the activities in this plan. Many suggestions can be implemented quickly for immediate results in thirty to sixty days. For example, brief weekly meetings can begin with a few days' notice and a quality circle can be formed at that meeting or before the next meeting. A preliminary list of suggestions could be devised in a few hours.

Ideas can be organized and considered by implementation time. For example, training films could be ordered and shown within two or three weeks. Changes to computer programs would probably take a month. A trophy could be obtained in a month. A timetable is attached for the activities included in this plan and shown in the appendix, along with the goals they are intended to address.

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Chapter 5

SUMMARY AND REFLECTION

There is tremendous potential within the current employees for improving student services by the bursar's office, if this latent resource can be tapped and utilized. This plan, and the activities which it contains, are meant to stir excitement about a vision or dream of improved service and a better image. This project is designed to kindle enthusiasm and gain the staff's commitment for change.

Many of the employees in the bursar's office are enrolled in courses at the university; they have a first-hand opportunity to identify the students' needs and to pinpoint problem areas. The proposed activities in this plan are only the first step in initiating change. By discussing and modifying these suggestions, the staff of the bursar's office will assume ownership of them and of the plan.

The bursar's employees also need to experiment and take risks by generating their own ideas for change. They must believe that they make a difference and that they are significant. In turn, their beliefs and actions will develop the true sense of involvement and empowerment needed for dramatic results.

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To achieve a transformation of the bursar's office, its employees must be motivated to share their knowledge of students' problems and to develop better skills to solve the problems which are arising. Overall, the bursar's office needs more relationship-oriented leadership than task-oriented leadership because their work can provide the feedback which shows achievement.

Upon reflection, it is clear that the most important task in leading the bursar's office to improved service and a better image on campus is the task of modifying staff members' perspective. Preparation of this plan has clearly indicated that the bursar's office has an organizational culture which no longer serves its purpose.

NSU's accounts receivable have been successfully reduced; the students are paying. The payment policies and system are better organized. Employees' lingering stance that the students resist them or object to paying is no longer valid.

A different social machinery with new attitudes and habits must evolve. Students must be regarded as customers whose satisfaction is vital to the well-being of the institution by the bursar's staff.

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Because front-line workers, like account coordinators and loan disbursers in the bursar's office, meet students at the window and over the phone, they dramatically affect student satisfaction. They need to render more cheerful, pleasant and personalized service. The staff needs to consider the implications of how their service is perceived, as well as the efficiency of the service itself. Each and every staff person is "the university" in dealings with students, parents and others.

They must reach out to others on the campus to convey an image of helpfulness and courtesy. This can be done effectively through their collective networks of informal relationships and facilitate dialogue and accommodation with other offices.

Each of the activities suggested in this plan are designed to enable the staff to meet these goals within a short time frame, at minimal expense. They do not require additional personnel, new equipment, increased phone lines, or added expense.

Applying the principles of transformational leadership as discussed in this plan, the bursar's office can successfully change its morale, image and service. The staff can deliver world-class service with a focus

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on the student as the customer. This improved service will improve the office's image, and in turn the employees' morale.

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APPENDIXES

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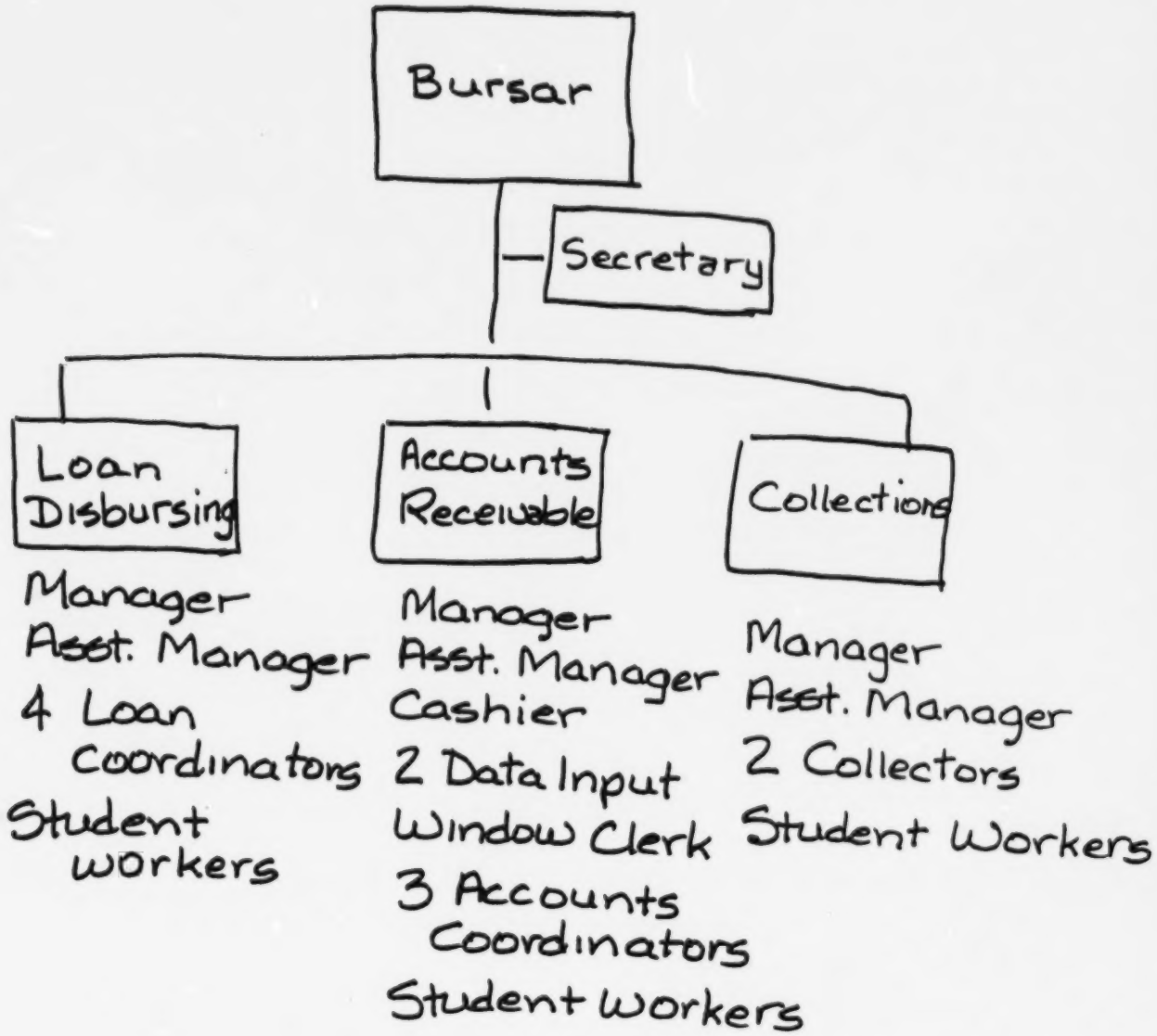
APPENDIX A

Organizational Chart



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APPENDIX B
Time Lines

	Weeks to Implement				*Goals*
	one	two	three	four	
Informal meeting	x				1, 3
President's memo	x				1, 2
President's visit	x				1, 2
Introduce VP	x				3
Idea list	x				2, 3
Invite students		x			1, 2
Quality circle	x				All
Invite other departments	x				1, 2
Prepare survey		x			1, 2
Future meetings		x	x	x	All
Network enhancement		x	x	x	2, 3
Training films				x	1, 2
Introductory video				x	1, 3
Interdepartmental exchange				x	1, 2
Role playing	x				1, 2
Development seminars				x	All
Cartoons on window	x				2
Adopt slogans		x			1, 2
Use students' names	x				1, 2
VP letter to winner	x				3
Newspaper column				x	2
Lollipops	x				1, 2
Post suggestions	x				1
Campus activities				x	All
Fact sheet				x	2
Name plaques on counter			x		3
Bulletin board		x			2, 3
Personalized letters			x		1, 2
Imprinted note pads			x		3
Business cards			x		1, 3
Employee of month award				x	All
Award trophy				x	All
Present gift				x	3
Monthly memo notices				x	All
Electronic messages			x		2, 3
Group parties, activities				x	3
Write up winners in report				x	2, 3

Goals: 1. Develop professional, courteous attitude toward students and fellow employees.
2. Improve public image.
3. Instill a sense of pride.

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